



**STATE OF MONTANA
MONTANA DEPARTMENT OF TRANSPORTATION
JOB PROFILE**

☒ Conversion from PD format
☒ Update
☐ Informal Review
☒ Formal Review

Date Submitted: 09/2008

SECTION I - Identification

Working Title:

Purchasing Services Supervisor

Department:

Montana Department of Transportation

Job Code Number:

Division & Bureau:

Administration Division;
Accounting Controls Bureau

Job Code Title:

Section & Unit:

Purchasing Supply Services

Pay Band:

6

Work Address:

2701 Prospect; Helena MT 59620

Position Number:

24003

Phone:

☐ FLSA Exempt ☒ FLSA Non-Exempt

☒ Non-Union ☐ MPEA ☐ Blue Collar

Profile Completed By:

Jody Brandt, Accounting Controls Chief
Larry Flynn, Administrator
Christy Stapley, Human Resource Specialist

Work Phone:

444-0859
444-9418
444-7477

Work Unit Mission Statement or Functional Description:

The Administration Division provides support services essential to the operation of the Department of Transportation including: management, accounting, cash collection, payroll, purchasing, budgeting, fiscal management, construction project management and office support.

The Purchasing Services Bureau provides service to various individuals and entities, including the Department personnel at all levels, vendors, contractors, cities, counties, other state agencies.

The Purchasing Services Section (PSS) is responsible for all Montana Department of Transportation (MDT) commodity purchases, contracted services, and building construction procurement activities. The PSS ensures compliance with all applicable state and federal bid letting, evaluation, procurement, and contracting rules, regulations, and procedures. The Section is also responsible for providing procurement training for MDT staff, providing technical expertise and assistance with the procurement of specialized goods and services.

Describe the Job's Overall Purpose:

This position is the Section Supervisor of the Purchasing Services Section (PSS), which is located within the Accounting Controls Bureau (ACB). The position is responsible for administering the Purchasing Services Section's policies, services, and equipment; developing and implementing bidding, selection, and purchasing policies, systems and procedures; providing technical assistance and expertise with procurement processes; and managing the, MDT Surplus Property Program.

The position reports to the Accounting Controls Bureau Chief and is responsible for management and supervision of 3.0 FTE professional level staff.

SECTION II - Major Duties or Responsibilities ***% of Time***

- A. **PURCHASING SERVICES SECTION ADMINISTRATION** **35%**
Administer the Purchasing Services Section's, policies, services and equipment to ensure effective and efficient use of agency resources and compliance with applicable state and federal laws, rules, and regulations. This involves program planning, establishing department policies and standards, evaluating and implementing automated systems and other tools to facilitate the procurement process, managing and monitoring the department's surplus inventory program, representing the section in planning activities within the bureau, division as well as agency wide. Work includes evaluating legislation, coordinating activities of the section with other work units and agencies.
1. Establish and monitor purchasing policies and procedures for the MDT. Develop and maintain operational policies and procedures to ensure efficient procurement by reviewing current MDT business practices and organizational structure, state (e.g., MCA Title 18) and federal requirements, product and service availability and determining their applicability to the MDT. Oversee the development and implementation of procedure manuals as necessary to meet federal, state, or internal needs or directives. Monitor compliance with established operational policies and procedures and achievement of goals through consultation and meetings with subordinate staff and supervisors, personal observation, and through discussions with other MDT staff. Ensure program compliance with federal, state, and agency laws, regulations, and policies by reviewing current policies and practices in relation to state and federal mandates and applicable legislation and mission mandates.
 2. Develop departmental bidding, procurement, and related policies and procedures (e.g., bid formats, boilerplates, etc.) to develop systems and operations that meet the needs of diverse programs and MDT operations, while maintaining consistency and compliance with applicable laws and regulations.
 3. Write and maintain the Montana Department of Transportation Purchasing Policies and Procedures Manual. This involves considerable research into current statutes and administrative rules, program operations, and agency wide needs and objectives. Develop and communicate recommendations for changes to administrative rules, proposed legislation, and new policies to the Accounting Controls Bureau Chief to improve procurement services provided by the Bureau. Develop and conduct training classes for MDT headquarter purchasing agents on all aspects of the purchasing process including specialized equipment and service procurement processes unique to the MDT; purchasing preferences; Federal requirements; basic purchasing concepts,

- requests for proposals, and other procurement processes from initiation of a request to the issuance of a legal and binding contract.
4. Develop short and long-range section work plans and objectives by reviewing current and projected MDT workload and funding (e.g., current and planned maintenance and construction projects), new legislation or administrative requirements affecting section operations (e.g., changes in bidding or public involvement requirements). Meet with the Accounting Controls Bureau Chief to coordinate section planning with bureau and division operations and recommend major program or policy changes.
 5. Monitor and analyze all legislative bills directly or indirectly affecting procurement processes to ensure management is aware of the bills and their potential impact on MDT purchasing services. Develop justifications or testimony (at the direction of the Accounting Controls Bureau Chief and Division Administrator) to ensure the Department's interests are represented in legislative matters. Update all MDT purchasing related policies and procedures to implement new legislation or administrative requirements.
 6. Develop and facilitate meetings with vendors, contractors, MDT staff and management (e.g., construction, materials, engineering, etc.) to provide information, training, and discussion opportunities regarding large commodities (e.g., beads, paint, deicer), industry trends, new MDT requirements, and other issues to ensure MDT staff and vendors/contractors are aware of requirements, and to improve purchasing processes and the quality and cost-effectiveness of goods and services purchased. Represent the MDT on state, regional, and national committees and associations to further the interests of the MDT, learn about new technology (e.g., equipment, materials, procurement systems, etc.), and participate in the development of national and regional testing, standards, and cooperative purchasing agreements.
 7. Manage the MDT Surplus Property Program to ensure that unneeded items are used elsewhere in the department or sold as surplus according to state policies and guidelines to ensure compliance with applicable surplus regulations and purchase eligibility and usage requirements. This involves writing and distributing Surplus Property Program policy and procedures; compiling an inventory of items and supplies no longer needed by the MDT, coordinating the transfer to surplus; periodically review equipment and supplies available through state and federal surplus programs through on-site inspection, catalog review, and online searches; and conducting cost/benefit and utilization analysis of potential surplus acquisitions to ensure they will meet agency needs in both the short and long term and coordinating all required paperwork and accounting transactions to acquire surplus property.

B. PROCUREMENT

40%

Develop and implement bidding, selection, and purchasing policies, systems and procedures, and provide technical assistance and expertise with procurement processes (e.g., requests for proposal – RFP, or invitation for bid – IFB) to ensure selection of high quality and cost effective goods and services that will meet agency needs, and ensure compliance with applicable state and federal laws and regulations regarding bid letting, selection, and other procurement processes.

1. Research and analyze general procurement and purchasing requirements found in state and federal legislation and Administrative Rules of Montana to identify how they relate to MDT needs and activities. Develop unique approaches to large and specialized

- commodity and service procurement process by analyzing the scope of proposed projects, interviewing management, engineers, and other specialized professionals to synthesize information regarding project needs. Develop policies and practices to meet specialized purchasing needs while maintaining compliance with administrative and statutory requirements.
2. Develop RFPs and IFB's for projects for the Construction and Maintenance programs. This includes projects that utilize State funding, Federal funding or a combination of both. These projects include the maintenance of the secondary roads (enacted by the 1999 Legislature; SB333); pavement preservation funding from all state funds to a combination of state and federal funds and working with the Transportation Commission for funding approval and delegated authority to award contracts. These projects can be for any type of construction or maintenance work (i.e. thin lift overlays, pavement marking, crack sealing, rut filling, sign installation, asphalt mix production, gravel crushing, winter maintenance materials, winter maintenance services, safety improvements, etc).
 3. Review requisitions for goods and services (in excess of \$40 million per fiscal year) to determine if the RFP or IFB process is most appropriate and efficient based on the nature of the goods or services requested (IFBs are generally issued when the scope of work and project approach are defined and the major determining factor will be cost, and RFPs are generally issued when the vendor must describe their approach, and other factors besides cost are considered). Review requisitions for goods and services to determine which laws and rules (Federal or State) apply and impart this information to the purchasing agent responsible for processing the requisition. Conduct research by interviewing MDT professional staff (e.g., computer specialist, engineers, maintenance, etc.), researching journals and online reference sources, and reviewing procurement histories to determine primary selection criteria and products specifications. Develop legal and concise formal RFP or IFB requests ensuring that all project, goods, or services terms, requirements and standard legal language is included. This may involve negotiations with the requestor to identify suitable product or service alternatives which may be more cost effective, or justifying and defending procurement processes (e.g., if the requestor wants to purchase a specific product or contract with a specific vendor without researching alternatives as required by state law). Develop timeframes for the proposal and selection process that meet agency demands and comply with legal and administrative requirement. Ensure that RFPs and IFBs are posted and sent to vendors according to established policies and in compliance with federal and state procurement, bid letting, and civil rights laws and regulations. Ensure all postings are clear, concise, in legal format, and include all relevant information needed for appropriate responses (RFPs include requests for information such as references, cost, specifications of equipment, firm's years of experience, samples of past work, etc.). Requests will be sent to potential vendors on the vendor list and posted on the Internet. The position may need to conduct (or direct subordinates to conduct) research to identify other potential vendors to develop a sufficient list (using sources e.g., the Internet, Yellow Pages, Thomas Register, State Purchasing Bureau, etc.). Ensure all bid information is made available in accordance with state requirements.
 4. Provide professional assistance and oversight to requestors on the development and application of selection criteria (primarily for RFPs). This involves ensuring rating criteria are valid and relate back to the goods and services requested. The position must ensure that selection criteria are not discriminatory and do not create an adverse impact on selected groups, and ensure they are not overly restrictive as to preclude otherwise viable alternatives. The position also provides direction in determining how to weight selection criteria. Ensure all Civil Rights and vendor preference laws and requirements

are followed. Respond or coordinate responses to vendor requests for clarification. This involves developing a list of all vendor questions (which must be submitted by a predetermined time), interviewing requestors to develop responses, and distributing responses to vendors and posting as required. Vendors, Purchasing Staff, or requestors may raise a point during this process which requires clarification or an addendum to the RFP document (e.g. if the MDT requested a service that isn't available or is prohibited). Develop changes in scope and develop and format clarifications and addenda.

5. Oversee the collection, logging, and security of vendor and contractor responses. This involves ensuring responses are time stamped, dated, and filed securely until the specific time of opening. Disqualify responses not received on time, and notify vendors. Review all responses to determine if they contain trade secret information (other vendors will not be allowed to see this information). Coordinate all review of responses (e.g., by requestors or vendors) to ensure compliance with right to know vs. right to privacy considerations and established selection processes (vendors may review IFBs at the time of opening, or may observe RFP selection meetings).
6. Coordinate and/or direct evaluation committee review of bids. This involves facilitating evaluation meetings; ensuring proceedings are appropriate, documented, and made available to the public according to open meeting laws; and ensuring evaluation committee members do not have a conflict of interest. The position provides professional advice and direction in the interpretation and evaluation of selection criteria and vendor/contractor responses, defining requests for additional information if needed, and arranging verbal interviews, presentations, demonstrations, and other selection processes. This may involve negotiations or discussions with top bidders to gather additional information such as costs associated with alternative approaches, different materials, etc., to ensure all vendors are judged on the same criteria. Direct or provide advice to evaluation committees in evaluating selection scores and developing recommendations or decisions for contract awards. Review committee scoring to ensure scores are realistic, appropriate (with regard to established criteria), consistent, and that there was no favoritism. Review projects prior to award to ensure all appropriate bonding, insurance, licensure, and other contract requirements are included. Review the draft contract with the vendor in consideration of any RFP clarifications or modifications to ensure all applicable terms and restrictions are included. Coordinate final review of contracts with legal staff, ensure all appropriate vendor documentation is received, and distribute copies of the final contract for signatures. If vendors do not agree with contract terms or if terms change due to unforeseeable or uncontrollable conditions (e.g., weather conditions affecting project completion dates, or selection processes taking longer than anticipated) the position will negotiate terms within general project parameters, and achieve consensus between vendors and project managers on revised terms.
7. Ensure contractors (and any subletting or subcontracting by contractors) fully comply with all applicable federal, state, or local laws, rules, and regulations (e.g., Title VI of the Civil Rights Act of 1964). This involves reviewing contractor documentation, providing training and technical assistance on compliance issues, and conducting research to gather additional information regarding potential violations of laws and procedures.
8. Direct all cooperative purchasing activities to enable the MDT, and county and municipal governments to take advantage of volume discounts, attain resources that would be otherwise prohibitive, and recognize other benefits and economies of scale. This involves reviewing material, equipment, and services available on a regional and national basis; short and long term cooperative purchasing planning; review of legal and administrative requirements at the state, county, and city levels; assessing and

synthesizing MDT and local government needs, negotiating terms of purchases with partners, vendors, and MDT staff; and ensuring the proper distribution, tracking, and accounting of cooperative purchases.

9. Manage the MDT ProCard purchasing program. The ProCard program is for those MDT employees who, for business purposes, need to charge expenses to a credit card account. The responsibility of the supervisor is to ensure proper and effective use of the card. This involves writing and maintaining related ProCard policies and procedures, developing and providing training on the program to MDT headquarters staff and field staff, issuing and canceling cards, tracking and monitoring the spending activity of card users, working with MDT management to resolve issues related to the ProCard, serve as the liaison for the MDT's ProCard program to resolve issues with vendors, card users as well as, advising the bureau chief of any necessary modifications needed within the program.

C. STAFF MANAGEMENT

15%

Manage professional staff involved in purchasing. This involves reviewing subordinate work plans and procedures, handling disciplinary actions and resolving conflicts, hiring, training, and recommendations for terminating staff. The position is responsible for identifying duties and responsibilities of subordinate positions; and evaluating performance.

1. Manage professional purchasing agents by reviewing and revising overall section work plans, priorities, and procedures, and monitoring progress through meetings and consultations. Conduct staff meetings, disseminate data, and promote information exchange for support and advancement of section goals.
2. Recommend and justify requests for additional personnel. Together with the bureau chief, identify staffing needs, recruit and hire employees. This involves ensuring compliance with state and federal employment and civil rights law throughout the hiring process, reviewing results and final recommendations for hiring, and ensuring proper training and orientation of new employees.
3. Determine training needs of section staff through analysis of program effectiveness, new technology and policies, and staff performance. Prepare, present, or arrange training through training offices, or outside consultants to ensure modern technology and proper techniques are used in procurement. Ensure consistency in application of training opportunities for all staff.
4. Evaluate the performance of all positions directly supervised by clearly setting expectations with section staff, consistently reviewing work of subordinates, completing performance evaluations, monitoring corrective actions including terminations, and consistently enforcing disciplinary policies.
5. Ensure compliance of section staff with State and departmental personnel rules, regulations, and policies and compliance with collective bargaining agreements.

F. OTHER DUTIES AS ASSIGNED

10%

Perform a variety of other professional procurement, administrative, and supervisory tasks as assigned by the Bureau Chief or Division Administrator. This involves work such as special

research projects, coordinating special events, and representing the MDT at meetings and conferences, attending training, giving presentations, etc.

2. *Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:*

For example, when to apply liquidated damages to contracts, when to extend contract completion dates, when to accept or reject bids, when to renew or re-bid contracts, when to revoke the bonds of poor performing contractors. Decisions made involve in-depth interpretation and analysis of contracts, written procedures and policies, federal, state and local laws and regulations, often involve research, and the incumbent must be able to synthesize this professional knowledge in order to apply the most appropriate remedy.

3. *The most complicated aspect of this position is:*

The position successfully applies professional knowledge, professional rules and regulations to diverse situations in which information such as interpretation of contract language and decisions made are precedent setting. For example, when deciding to accept or reject a bid, the position must consider performance, local laws, federal laws, related purchasing manuals, standard provisions/procedures and have the ability to balance these variables in order to develop a successful resolution. This position is the sole departmental expert in purchasing related activities; therefore, there is limited guidance available to the incumbent. The incumbent can rely on MDT legal division, DOA State Procurement Bureau, and the ACB bureau chief for guidance if needed.

4. *Guidelines, manuals, or written procedures that support this position include:*

Guidelines, manuals, and written procedures available to the incumbent include Administration Division objectives and Purchasing Services Bureau goals; FHWA, MDT, FTA, FAA, Title 18, MCA and local laws, rules and regulations must all be balanced and adhered to. Manuals include, Standard Specifications for Road and Bridge Construction, MDT Detail Drawings, Standard Special Provisions, Department of Administration Purchasing Manual, MDT Purchasing Manual, Purchasing Services Bureau memos, written bid procedures, user guides for office software and internet references.

5. *The following duties and/or specific tasks listed under 1 above are considered “essential functions” because they require specialized expertise and skill and are the primary reasons the job exists (they must be performed by this position with or without accommodations):*

The following mental and physical demands are associated with these essential functions:

PHYSICAL

- Light lifting (less than 10 lbs.)
- Carry light items (papers, books, small parts)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Travel within the state to project locations, out of town training, and out of state travel by airline to national conferences and meetings.
- Operating a personal computer
- Communicate in writing, in person, and over the phone

MENTAL

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Decision making that affects public health and safety
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing
- Coordinating

6. **Does this position supervise others?** ☒ Yes ☐ No

Number directly supervised: 3

Complexity level of the positions supervised: 4, 5, 6 (career ladder in place)

Position Number(s) of those supervised: (current incumbents)

Position #	Class Code	Band	Title	FTE
24006	131214	4	Purchasing Agent	1.0
24004	131216	6	Purchasing Agent	1.0
24001	131214	4	Purchasing Agent	1.0

Total staff size: 3.0 FTE

7. **This position is responsible for:**

- ☒ Hiring ☒ Recommends Termination ☒ Supervision ☐ Pay Level
☒ Performance Management ☒ Promotions ☒ Discipline
☐ Other:

8. **Attach an Organizational Chart.**

SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.

Critical knowledge and skills required for this position:**KNOWLEDGE:**

(Program Administration/Professional Knowledge)

The position requires knowledge of the concepts and theories of business administration and government procurement and contracting; procurement processes and practices; state and federal purchasing, procurement, and contractual regulations, policies and procedures; development and monitoring; business law, cost/benefit analysis; state and federal procurement

laws and regulations; Civil Rights and vendor preference requirements; public meeting laws and administrative procedures; right to know vs. right to privacy considerations; competitive procurement, contract formation, program planning, specification preparation, project management, legal and contractual remedies,

(Inventory Control)

The position also requires knowledge of inventory management; cost and inventory projection; quality control; and computerized inventory programs. This work also requires knowledge of state inventory management and control and surplus programs and requirements.

(Staff Management)

Knowledge of MDT and State Human Resources personnel procedures and policies, organizational theory, employment law, program requirements, public administration, collective bargaining agreements, labor relations, and personnel management practices and techniques; as well as computer systems and related software.

SKILLS:

Skill in the management of resources through various automated systems; leadership, negotiation; problem resolution; mediation; work planning, delegation, data collection and analysis; verbal and written communication; development and organization of procedures; program planning; operation of a personal computer, spreadsheets, word processing software, division and state computer applications, the Internet, an automobile, multi-line telephone, and audio/visual aides used in presentations.

Behaviors required to perform these duties:

Ability to meet deadlines; lead procurement processes; analyze a variety of commodities and equipment; research and interpret data; develop, plan, and write reports on a variety of topics; interpret and solve problems on a daily basis; extend existing and accepted purchasing laws and practices through the development of legislation and administrative rules; prioritize projects; develop and maintain effective working relationships with a variety of individuals and agencies; negotiate with, and persuade a variety of individuals; communicate effectively; and motivate a variety of personnel.

Education:

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- | | |
|---|--|
| <input type="checkbox"/> No education required | <input type="checkbox"/> Related AAS/2-years College/vocational training |
| <input type="checkbox"/> High school diploma or equivalent | <input checked="" type="checkbox"/> Related Bachelor's Degree |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree |

Please specify the acceptable and related fields of study:

Required/Acceptable: business administration, purchasing/procurement, contract management

Related:

Other education, training, certification, or licensing required (specify):

Experience:

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

- ☐ No prior experience required
☐ 1 year
☐ 2 years

- ☐ 3 years
☒ 4 years
☐ 5 or more years

Other specific experience (optional):

Supervisory experience is required.

Public sector experience is preferable.

Alternative Qualifications:

This agency will accept alternative methods of obtaining necessary qualifications.

☒ Yes ☐ No

Alternative qualifications include:

Associate's degree in business, purchasing or related field AND six years of related public sector purchasing experience to include supervisory and management.

OR

Eight years of related public sector purchasing experience to include supervisory and management.

SECTION IV – Other Important Job Information

SECTION V – Signatures

Signature indicates this statement is accurate and complete.

Employee:

Name: Diane Tordale

Manager, Purchasing Services

Signature: _____

Date: _____

Immediate Supervisor:

Name: Jody Brandt

Bureau Chief, Accounting Controls

Signature: _____

Date: _____

Division/District Administrator:

Name: Larry Flynn

Administrator, Administration Division

Signature: _____

Date: _____

Department Designee:

Jennifer Jensen

Administrator, Human Resources Division

Signature: _____

Date: _____